

CITIZENS SERVICES BUREAU PROGRAM SPECIALIST ROLE

Role Summary

The Citizens Services Bureau Program Specialist role consists of one grade level (12). Work involves the performance of administrative, technical, and/or professional duties. Incumbent coordinates program activities with the Citizens Services Bureau Chief, provides administrative, clerical, and technical support to facilitate the work of the bureau; ensure the office is maintained in a manner consistent with department policies. Primary contacts are with the division administrator, bureau chief, Human Resource staff, Statewide Facility Officer, internal/external customers, and other department staff.

Working Conditions

Considerable stress and pressure due to contact with taxpayers; a complex, heavy workload; and conflicting priorities. Considerable time is spent at a computer terminal.

Education and Experience

- Grade 12: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to high school graduation and post-secondary coursework in business with four years of administrative, technical, or clerical experience including advanced computer skills. Other combinations of education and experience will be evaluated on an individual basis.

Department Core Competencies

In addition to the role specific competencies, there are four, department core competencies that all employees are expected to successfully achieve. These are:

- *Interpersonal Skills:* Builds constructive and effective relationships with internal and external customers and is committed to meeting customer needs in a timely and accurate manner. Listens actively and attentively and demonstrates an appreciation of other perspectives. Builds the appropriate rapport required to do business. Openly demonstrates an understanding of and respect for the value of co-workers' contributions to the department mission.
- *Decision-Making and Accountability:* Considers the department's vision, mission, and values in making decisions and taking actions. Identifies and considers possible alternatives before making decisions. Bases decisions on achieving desired outcomes pursuant to the departmental business plan or management direction. Uses a combination of analysis, experience, and sound judgment that results in fairness and consistency, while being accountable for actions. When serious ethical issues are at stake, takes all necessary actions.
- *Commitment to Continuous Improvement:* Ability and willingness to continually seek greater efficiency in agency programs, is results driven, and meets changing requirements in work or direction. Adapts to changing conditions and work responsibilities. Accepts constructive criticism and suggestions and uses them to improve performance.

- *Personal and Work Ethics:* Creates own measures of excellence, and practices what he/she promotes. Sets goals that provide challenges and measures goal attainment regularly. Displays a contagious optimism about the work to be done. Goes beyond traditional ways to address issues despite obstacles or resistance. Is able to generate ideas, fresh perspectives, and original approaches and engages in open-minded thinking. Employs strategies to promote ideas and proposals to increase probability of acceptance. Mentors others to improve the performance necessary to achieve success. Reflects a belief that the results achieved are a direct result of his/her personal decisions and actions.

Grade Levels

Each grade level lists the essential duties that describe work performed 50 percent or more of the time (predominant work). Established work plans identify day-to-day tasks.

Grade 12

Predominant/Essential Duties

- Conduct research and prepare written reports to bureau chief regarding call center, abandoned property, forms design, and OneStop licensing.
- Maintain and track database systems for assigned work.
- Create and compile responses to correspondence for the bureau chief's signature.
- Review and summarize studies, federal laws, court orders, and other important documents for the bureau chief's review.
- Compile statistical and narrative status reports including development of spreadsheets, graphs, and charts.
- Call center backup (25% of total time)
 - Conduct research and analysis to complete taxpayer inquiries as a call center backup; interview taxpayers and gather complex, multiple, and appropriate facts regarding tax filing, registration, licensing, or any area the taxpayer requires.
 - Apply law, policy, and precedent to taxpayer tax inquiries and problems and update tax files accordingly.
 - Educate taxpayers on tax preparation, licensing, assessments, tax law, and collections.
 - Act as taxpayer advocate.
 - Research facts and circumstances regarding a taxpayer problem and determine response given legal constraints and/or goals and objectives.
 - Determine precedent setting or extraordinarily technical questions and refer to appropriate sources, taking ownership in assisting with a timely response.
 - Identify problem issues, determine likelihood of resolution, and close cases.
 - Determine whether to award One Stop licenses, from various state government agencies, to customers.
 - Upon determination that a taxpayer needs to be registered, send work item and all pertinent information to PRO for registration and coupon creation.
 - Utilize knowledge of all tax laws, payroll accounting, office auditing techniques, and available electronic resources to provide overall tax service to taxpayers. Assist taxpayers in filing returns for all tax types, of filing deadlines, of filing deficiencies, and advise businesses of all tax responsibilities.
 - Advise taxpayers and tax practitioners on the proper methods and procedures for preparing returns based on federal and Montana laws, rules, and regulations.
 - Inform taxpayer concerning taxable income and allowable deductions.

- Withholding account maintenance responsibilities.
 - Correct account payment errors.
 - Notify and educate taxpayer of filing requirements.
- Abandoned property responsibilities.
 - Assist in processing claims.
 - Data entry.
 - Act as primary back up.
- Cigarette Tax
 - Act as primary back up for mailing of cigarette stamp orders.
- Research inquiries as necessary to provide information on existing policies, procedures, rules, and statutes.
- Proofread and edit documents using established process guidelines.
- Provide general information for individual income tax, withholding, corporate license and collections documents.
- Responsible for office maintenance functions, i.e., equipment and office supplies.
- Work closely with multiple work units (collectors, auditors, registration and licensing staff, abandoned property staff, tobacco tax staff, call center, one-stop licensing).
- Review call center employees' performance, tone, correctness, and overall customer service through the use of the spy phone and established guidelines.
- Provide human resource assistance to the Citizens Services Bureau Chief by reviewing roles, monitoring training curriculum for Citizen Services' employees, coordinating new hires, and serving on hiring panels.
- Responsible for facility issues at the liquor warehouse (heat, security, phones, etc.)

Competencies and Degrees of Proficiency

The Competency/Proficiency Chart identifies the role specific competencies, degrees of proficiency, and guidance required for each grade level. Role specific competencies describe the knowledge, skills, and abilities required to perform the essential duties. The degrees of proficiency indicate the difficulty and/or complexity level of the tasks and assignments.

Competency/Proficiency Chart – Citizen Services Bureau Program Specialist Role

Competencies	Grade 12 Minimal Guidance
Demonstrated skill and ability to maintain office equipment and resources.	C
Demonstrated skill and ability to work on multiple tasks.	C
Demonstrated knowledge and skill of word processing, spreadsheet, database, and software applications/programs relative to the role.	C
Demonstrated ability to provide timely and effective written, oral, and interpersonal communication.	C
Demonstrated knowledge and ability in conflict resolution techniques relative to the role.	C
Demonstrated knowledge of individual tax types and their relationships within the organization.	C
Demonstrated knowledge and effective application of federal/state statutes, administrative rules, and state policies and procedures relative to the role.	C
Demonstrated analytical skills relative to the role.	C
Demonstrated research skill relative to the role.	C
Demonstrated knowledge of department business processes and ability to apply that knowledge effectively.	C
Demonstrated ability to think creatively and recommend innovative solutions.	B
Demonstrated knowledge of licensing and registration requirements.	B
Proactively focus efforts and energy on successfully attaining goals and objectives, assuming accountability for decisions, actions, and results. Follow issues through to completion.	C

Degree of Proficiency

A: A degree of knowledge, skill, or ability commensurate with elementary-level tasks and assignments.

B: A degree of knowledge, skill, or ability commensurate with intermediate-level tasks and assignments.

C: A degree of knowledge, skill, or ability commensurate with advanced-level tasks and assignments.

D: An advanced degree of knowledge, skill, or ability commensurate with considerable experience and the application of the competency to non-standard tasks and assignments.

E: The most advanced degree of knowledge, skill, or ability, evidencing complete mastery and understanding of the subject.